MEDIA DIRECTOR
MICHAEL WHITE

THE 1988 MEDIA ALL-STARS

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MARKETING & MEDIA DECISIONS

COVER STORY

THE 1988 MEDIA ALL STARS

Once again, clients have guided us to the few special individuals who made a big difference in planning and buying the media this year. Our All Stars, along with their Star Watch colleagues, represent the best and the brightest that today's agency media department has to offer in nine areas of expertise. Spotlights, please!

MEDIA DIRECTOR: MIKE WHITE 42

He does it all for DDB Needham in Chicago. He sells the agency, nurtures and supports his team and elevates media to new heights of professionalism. Star Watch: Jane Twyon, NW Ayer, New York.

ASSOCIATE MEDIA DIRECTOR: CHARLES RUTMAN 53

His work for Backer Spielvogel Bates' Hyundai and Wendy's accounts makes all the difference in competing with their giant rivals. Star Watch: Kelly Black, J. Walter Thompson U.S.A., San Francisco.

NATIONAL BROADCAST: RICHARD HOBBS, JR. 63

His roots in broadcast run deep, but that doesn't prevent this media director from branching off to lead Leo Burnett's clients in new directions. Star Watch: Michael Wang, Campbell-Mithun-Esty, Detroit.

LOCAL BROADCAST: LAURA SILTON 69

The client comes first for her, whether in painstaking reviews of her department's plans or in arguing with McCann-Erickson management on her clients' behalf.

PRINT: HENRY ANTOSZ 77

In true Chiat/Day form, he threw out the rule book and reinvented the print buy this past year for Nissan. The end result: more money in fewer books. Star Watch: Pam Barnett, J. Walter Thompson U.S.A, New York.

OUT-OF-HOME: C. PETER RIORDAN 85

He's conservative but effective, and his clients like it that way. It's one reason Lever Bros. and Campbell's have given him responsibility for their tests of in-store media. Star Watch: Chris Massler, Leo Burnett, Chicago.

CABLE: WES DUBIN 95

DDB Needham's Chicago-based broadcast whiz feels cable is rife with opportunities for his packaged-good clients. And he proves it. Star Watch: Elizabeth Russo, Saatchi & Saatchi DFS Compton, New York.

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MEDIA RESEARCH: STEVE SINGER 109

His past history and his strong, new leadership at Young & Rubicam have made him the standard bearer for his profession. Star Watch: Susan Nathan, Laurence, Charles, Free & Lawson, New York.

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Charles Rutman, Backer Spielvogel Bates

Steve Singer, Young & Rubicc

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Michael White, DDB Needham

Henry Antosz, Chiat/Day

Laura Silton, McCann-Erickson

Susan Rowe, NW Ayer

Richard Hobbs, Jr., Leo Burnett

Wes Dubin, DDB Needham

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COVER PHOTO CREDITS: Adam Chinitz (5), Richard Derk (2), Jim Caccavo, Gary Sigman Black Star.

MARKETING & MEDIA DECISIONS (ISSN0195-4296) December 1988. Vol. 23, No. 12 Copyright © 1988. Decisions Publications Inc. Published monthly. Executive, editorial, circulation and advertising offices at 1140 Ave. of Americas, New York, N.Y. 10036 (212) 391-2155. Available without charge to those personally involved in media decisions at major agencies and advertiser companies. For others, subscription prices are: U.S.A. $48 for 12 issues. Canada $60. Overseas $70 (surface mail). Airmail — add $70. Single copy $4.00. All overseas copies are paid. Second-class postage paid at New York, New York, and additional mailing offices. Postmaster: Send address changes to Marketing & Media Decisions, P.O. Box 6069, Duluth, MN 55806-9769.

FREEZE FRAME

by Richard Huff

PEOPLE METERS AND CABLE

From the beginning, cable tv has worked under a cloud of questionable comparisons to broadcasters. Nowhere was this more evident than in the methods used to measure audiences for each. Unlike broadcast networks, which have always used standardized Nielsen ratings reports, cable networks historically have published their Nielsen ratings in tailor-made versions that more often than not highlighted their strengths and masked their weaknesses.

That was, however, until the start of this broadcast season, when Nielsen began measuring the ratings of cable networks on the same people-meter system used for broadcast network ratings. For the first time, the two are being measured by the same yardstick.

Although Nielsen had converted its national ratings system to people meters last season, cable ratings for the 1987-88 season came from a hybrid method that combined household estimates from the people-meter sample with viewer-per-household estimates (used to produce demographic ratings) derived from Nielsen's diary-based sweeps. The reason: With only 2,000 households in the 1987-88 people-meter sample, researchers felt the standard of error would be too great to accurately produce cable ratings.

But effective with the 1988-89 season, Nielsen's people-meter sample has grown to 4,000 households, enough to instill confidence in people-meter ratings for cable networks. Besides providing more valid numbers, the move conforms all national television media — network, syndication and cable — on the same playing field.

"This puts cable on an equal footing," says Grey vice president and associate media director Jon Mandel. He also thinks meters will make the industry a "little more honest."

Indeed, because of the lack of uniform ratings between cable networks, as well as between cable and broadcast networks, agencies have found it difficult making comparisons.

For example, a recent survey of client and agency executives conducted by Infomarketing Research found that 70% were not satisfied with cable data.

"You may see some people who didn't believe in the old data buy into cable now," says Steve Sternberg, vice president and manager of broadcast research of Bozell, Jacobs, Kenyon & Eckhardt.

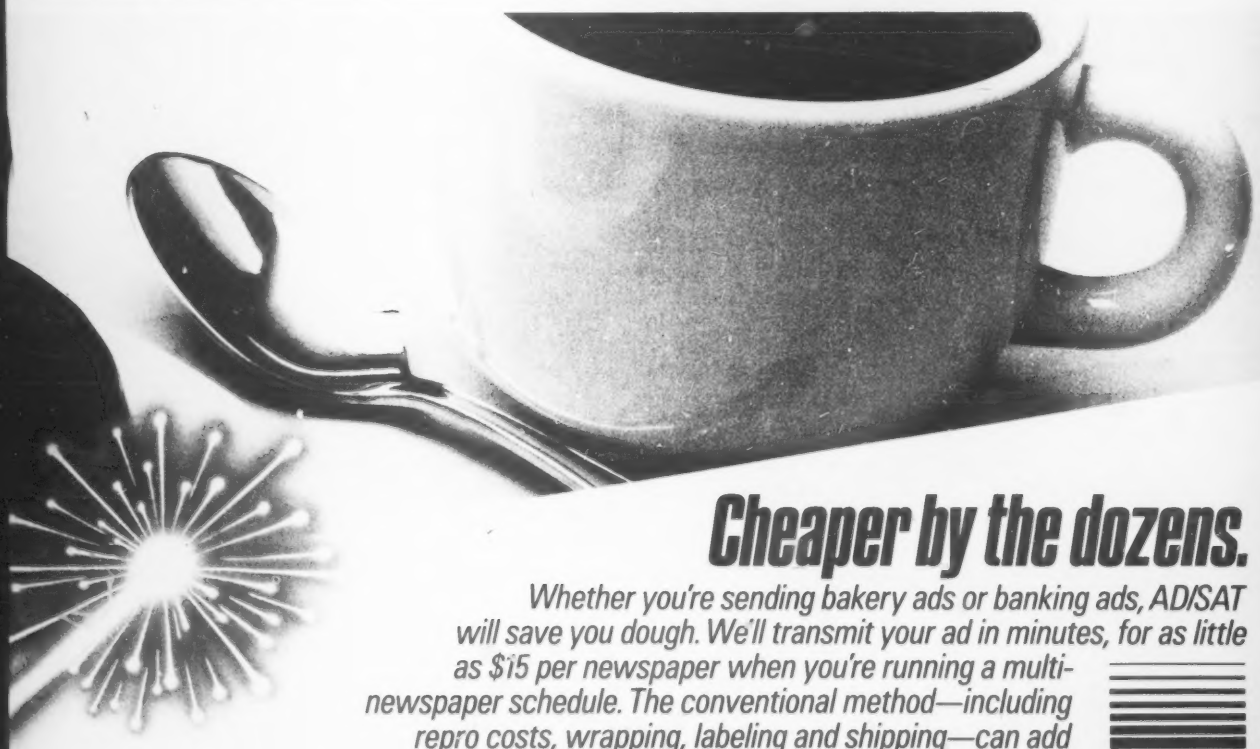
While this ultimately will lead to more informed cable planning and buying decisions, industry observers feel the real results won't be felt for some time. BJK&E's Sternberg, for instance, feels it could be at least a year before people meters change buying habits for cable tv. The problem, he says, is that agencies won't have people-meter data at their fingertips until February. Until then, agencies will have to rely on the cable networks to provide them with accurate numbers.

However, when change does come, it will likely be profound. A by-product

APPLES TO ORANGES
PEOPLE METER-TO-DIARY VIEWERS PER HOUSEHOLD
INDICES (DIARY = 100)

	Persons			Women			Men		
	2+	2-11	12-17	18-34	18-49	25-54	18-34	18-49	25-54
BET	93	120	100	82	82	89	91	93	97
CBN	104	104	139	103	108	108	102	111	110
CNN	102	258	179	131	113	103	160	120	115
ESPN	104	178	127	125	127	126	100	89	93
LIFE	106	135	163	102	106	101	132	131	124
MTV	99	116	70	84	89	100	116	116	134
TWC	104	168	213	108	101	94	126	112	107
VH-1	101	108	124	81	86	83	102	105	106
WTBS	99	85	112	89	102	103	106	105	104
USA	97	89	98	97	104	104	104	101	101
Weighted Avg.	100	99	102	95	103	104	109	104	105

Source: Bozell, Jacobs, Kenyon & Eckhardt analysis of preliminary people-meter data for cable; average of Nov. '87, Feb. '88 and May '88 sweeps.



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FREEZE FRAME

of the larger people-meter sample is the ability to break out more demographic categories that will allow cable networks to substantiate their undocumented viewership claims.

"CNN has claimed for years that it has had younger demographics, when news generally skews older," points out Grey's Mandel. In fact, a BJK&E analysis (see chart, pg. 39) of preliminary people-meter data indicates that CNN's audience skew may be different than previously thought. The report shows CNN has fewer older viewers but a higher number of children and teens in its audience comp compared to the old diary results.

Researchers think the people-meter results are more accurate than ratings produced by diaries. This is believed to be due to a "halo effect" that falsely attributed viewing to broadcast network shows at the expense of alternatives such as cable.

People meters are not without system flaws, however. It has been acknowledged that Nielsen has problems measuring children and teens. For example, early people-meter results indicated that MTV's teen audience is off some 30%, but also shows an increase in viewers 2-11 years old.

Still, observers agree that even if demographic shifts affect the bottom lines at some cable networks, it will net out even for cable as a whole. "Most of our cable buys are a percentage of a network budget," says Sharon Magee, project associate for St. Louis-based Advanswers. "People meters may cause us to shift between cable networks as demographics change, but on a whole, people meters won't add or take away advertisers from cable."

The USA Network's David Bender, vice president of research, doesn't think people meters will change buying habits until the numbers have stabilized, and even then, he is not sure buying habits will change much. "People are going to wait for some good, reliable numbers before making any changes," says Bender. "Until we get a better handle on who's in the room and measurement for commercials, there may not be a difference in buying patterns."

BJK&E's Sternberg, however, predicts that demographic changes will lead to tougher cable negotiations. "Those cable networks that demonstrate higher ratings among their key selling demographics will try for cost increases, while those that show declines will also try for cost increases as a safeguard against further declines."

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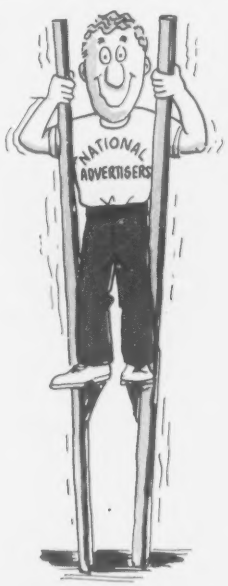

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PLANNING

John McSherry –
Senior vice president, director, corporate media services, Bozell, Jacobs, Kenyon & Eckhardt, New York

THE IMPACT OF MULTI-SET VIEWING ON MEDIA PLANNING

The growth in households with more than one television set has been dwarfed in the last ten years by the growth of cable and VCRs. Penetration, however, currently exceeds VCR or cable, steady growth has continued since 1980 with penetration up 1-2% each year.

PENETRATION OF TV HOUSEHOLDS

Broadcast Year	Multi-Set	VCR	Cable
1979/80	50	2	18
1983/84	55	17	41
1988/89	63	59	52

Source: Nielsen & BJKE Estimates

More than 10% of adults now have four or more sets in their homes; miniature sets, those with less than a 10-inch screen, are found in 12% of homes.

Traditionally, audience measurements centered on households due to limited people data. People diaries were adjusted to the "more reliable" metered-household set levels. In the diary sample, households with more than one set received diaries for each set. In the metered sample, all sets in the household were monitored.

All television sets in the household are monitored with people-meter measurement. Although the television household is an anachronism, it continues to persist due to the negotiating stance of the networks. Eventually, household measurement may disappear since it no longer can account for the mobility portability of the medium. Viewing together can occur at the beach as well as the bedroom. Until household measurement disappears, however, caution must be exercised in using some of the basic relationships between households and people.

Since multi-set households tuned to two different channels are counted twice for the ratings but once for usage, traditional use relationships between households and people are distorted for many applications. In order to determine average station channel tuning relationships between households and people, it is necessary to adjust households and account for multi-set usage.

The adjustments may be used as multipliers for the household usage or divisors for traditional people conversion factors.

Bozell has built multi-set conversion factors into spot television reach and frequency programs as offered by IMS — TVPLUS5 and Meterfax. This allows our planners to get household and people rating points that account for multi-set usage. Other interested users should contact IMS for information regarding access.

Additionally, our initiatives have prompted Nielsen to provide a new syndicated "Alternate Viewing Sources Report" that provides conversion factors to account for multi-set usage.

As television evolves into a more personal, individual medium, a better understanding of multi-set usage is critical. We need to quantify solitary viewing versus group viewing and develop an understanding of how commercials perform in each environment. ■

JULY '88 PERCENT ADJUSTMENTS FOR HOUSEHOLD USAGE TO ACCOUNT FOR MULTI-SET USAGE

M-S	24-hours	+6%	M-S	8 P.M.-11 P.M. (Sun. 7-11)	+8%
M-F	Midnight-10 A.M.	+4	M-S	11:30 P.M.-1 A.M.	+8
M-F	10 A.M.-1 P.M.	+5	SAT.	8 A.M.-1 P.M.	+5
M-F	1 P.M.-4:30 P.M.	+6	SAT.	1 P.M.-7 P.M.	+5
M-F	4:30 P.M.-6 P.M.	+6	SUN.	8 A.M.-1 P.M.	+4
M-F	6 P.M.-7:30 P.M.	+5	SUN.	1 P.M.-7 P.M.	+6

PRIME TIME EXAMPLE JULY 1988

Multiplier	
Household Usage	60.5
(X) Multi-Set Adjustment Factor	1.08
Adjusted Household Usage	55.0

Divisor	
Conversion Factor Women (55+)	92
(%) Adjustment Factor	1.08
Adjusted Household Factor	85

Source: A.C. Nielsen

BRAND REPORT

No.159: Near-Luxury Cars

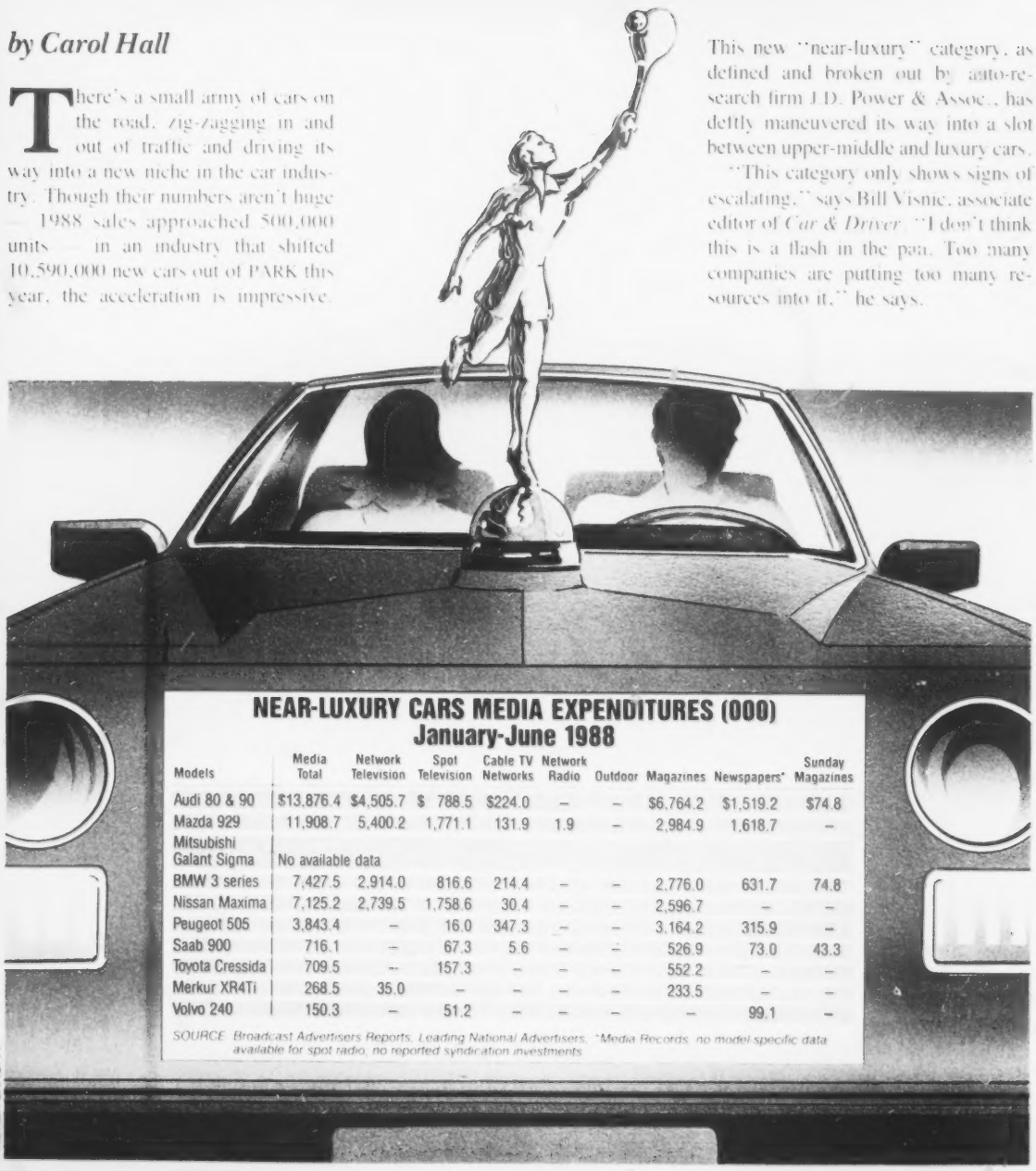
YUPMOBILIA

by Carol Hall

There's a small army of cars on the road, zig-zagging in and out of traffic and driving its way into a new niche in the car industry. Though their numbers aren't huge — 1988 sales approached 500,000 units — in an industry that shifted 10,590,000 new cars out of PARK this year, the acceleration is impressive.

This new "near-luxury" category, as defined and broken out by auto-research firm J.D. Power & Assoc., has deftly maneuvered its way into a slot between upper-middle and luxury cars.

"This category only shows signs of escalating," says Bill Visnic, associate editor of *Car & Driver*. "I don't think this is a flash in the pan. Too many companies are putting too many resources into it," he says.



ANDREA BARUFFI

NEAR-LUXURY CARS MEDIA EXPENDITURES (000)
January-June 1988

Models	Media Total	Network Television	Spot Television	Cable TV Networks	Network Radio	Outdoor	Magazines	Newspapers*	Sunday Magazines
Audi 80 & 90	$13,876.4	$4,505.7	$ 788.5	$224.0	–	–	$6,764.2	$1,519.2	$74.8
Mazda 929	11,908.7	5,400.2	1,771.1	131.9	1.9	–	2,984.9	1,618.7	–
Mitsubishi Galant Sigma	No available data								
BMW 3 series	7,427.5	2,914.0	816.6	214.4	–	–	2,776.0	631.7	74.8
Nissan Maxima	7,125.2	2,739.5	1,758.6	30.4	–	–	2,596.7	–	–
Peugeot 505	3,843.4	–	16.0	347.3	–	–	3,164.2	315.9	–
Saab 900	716.1	–	67.3	5.6	–	–	526.9	73.0	43.3
Toyota Cressida	709.5	–	157.3	–	–	–	552.2	–	–
Merkur XR4Ti	268.5	35.0	–	–	–	–	233.5	–	–
Volvo 240	150.3	–	51.2	–	–	–	–	99.1	–

*SOURCE: Broadcast Advertisers Reports, Leading National Advertisers. *Media Records: no model specific data available for spot radio, no reported syndication investments.*

Print is used in a big way in many magazines by leader Nissan.

Unlike the luxury or upper-middle categories of cars, for instance, near-luxury is not a term universally used by car makers — foreign or domestic. But the segment represents the direction much of the automotive industry is traveling in. It is upscaling cars to combine luxury features with performance — notice how many brands offer a "turbo" model recently? To a degree this trend has even affected the economy segment, the hot category five years ago. (Case in point: the new Hyundai Sonata, the company's first spiffy entry.)

Near-luxury is an "oddball segment,"says David Danzer, Toyota's national advertising manager. "But we see it as a very important segment and a growing one as people hopefully become more affluent. As the yuppies get older," he explains, "they are looking for a better car, but aren't [always] willing to spend $50,000 or $60,000."

But despite their souped-up engines and their fancy standard equipment — things like auto-adjust suspension and moon roofs — these aren't sports or luxury cars. There is a third element to them: practicality. Therefore, advertising for the segment is likely to emphasize style, speed and comfort, but also safety and durability.

The criteria for selecting the cars for Power's near-luxury list are wide-ranging. According to Chris Cedergren, senior automotive analyst at Power, the company looked at cars in terms of price, size, type of engine, standard features versus options, styling, reputation for quality, who the manufacturer is trying to sell to and who they actually are selling to. A car's image, perhaps the fuzziest criteria, was very important for the list. The company collects its data through phone interviews with consumers, mailings and in focus groups.

Most of the cars on the Power list, all imports, are either "starter" cars, entry-level models for existing luxury brands — the BMW, for instance — or upscale cars for automakers who have yet to forge their reputation in the luxury market, as with the Toyota.

Japan is a strong contender in this segment, the Nissan Maxima dominating the lot. Though it's still a category most people might associate with European cars, Toyota's Danzer says that's changing. "More people are familiar with and knowledgeable about Japanese cars," he maintains "so they don't necessarily feel they have to look to Europe now."

The sales volume for this category is small for the car biz, where a mass-market entry like the Chevrolet Celebrity can roll nearly 200,000 units out of the showroom in a year. But a glance at the average sticker price of the near-luxury wheels — all are over $17,000 — and a look at their demographics show that these are not mass-market cars to begin with. As Maryann N. Keller, a vice president and automotive analyst at Furman, Selz, Mager, Dietz & Birney notes, "This is a collection of niche products." They have, she says, "specific images and go after a small group of customers with one-of-a-kind cars."

So who would have guessed that near-luxury, such a refined-sounding category, would cause a veritable pile-up of opinions in automotive circles? The cause of the verbal fender-bender: There are no domestic cars on the list. "We compete, whether Mr. Powers says we do or not," charges Harold Jackson, a spokesman for General Motors. "I think the shoe's on the other foot: They're trying to compete in a market we have."

"The Mercury Sable clearly fits on this list," roars L.R. Windecker, research and analysis manager at Ford Motor Co. He says the Maxima is "simply another mid-sized car, the same as the Sable. I can't help it that we sell a comparable car for less money (about $15,000), and I don't think that's a fault," he says vehemently.

"There are certain arguments for Taurus or Sable" making the list, agrees Cedergren. "But given the volume of those cars, well, they're positioned as more mainstream sedans." Though some accuse Power of slighting domestic manufacturers in the near-luxury category, Cedergren says Detroit didn't make the cut because its cars have less exclusive images. "There is nothing wrong with that," he states. "They are volume sellers, and just because GM, for instance, doesn't have any cars on the list doesn't mean that they're not making good cars. If GM had a lot of near-luxury cars," he points out, "they wouldn't have 35% of the market."

Keller also notes that the price-to-size ratio of cars and imports is still, for the most part, different. "Detroit doesn't make cars that are small and luxurious," she says. "I don't think their customers will tolerate a small body and a high price." Many Americans just plain prefer bigger cars and,

with gas back in the dollar-a-gallon range, they don't feel they have to scale down.

Keller adds that it's not a question of whether the domestic auto industry is capable — citing the new Taurus SHO, a fancy performance car about $19,000, as proof positive. "The question is: Do they want to go up against BMW," a car maker unlikely to ever have the mass-market volume Detroit has.

But *Car & Driver's* Visnic sees it differently. "I don't think the domestics have caught on to what it takes," he says. "They haven't learned how to fight it out in the performance-oriented luxury category." He adds that Detroit's luxury cars, like the Cadillac, don't usually emphasize performance, and those that do are usually more sporty than those called near-luxury.

Nissan Maxima

It's just coincidence that many of the cars on the near-luxury list, compiled in 1988, have been restyled for model year '89. Some, at the end of their product life-cycle of four or five years, received a face-lift as a matter of course. Others, like the Nissan Maxima, undergo a degree of restyling almost every year.

The Maxima, says national car advertising manager Tery Foutz, is "completely different" this year. Rest assured, it still has four wheels. But the Maxima's been given a more powerful V-6 engine, more interior room ("It was designed around five six-foot-plus people") and a sleeker, less cushy look that some say leans heavily in the direction of Honda's Accord. In addition, it's also been given a new image.

The Maxima has been on the market for years, but until 1982, it drove around as the Nissan 810. "When it was originally conceived," says one auto analyst, "there wasn't much direction for the car."

Not true now. It is far and away sales leader of this category, according to J.D. Power's nine-month figures, with sales of 48,717 cars. The company projects 1989 sales will top 100,000. The Maxima has been successfully positioned as a practical, yet classy, sedan.

"Everything would suggest we'd

Detroit's mass-market approach prevents its entry in this narrow segment.

position this as a luxury car," says Foutz, "but we've chosen to position it as a four-door sports car because it has outstanding performance." Indeed, new ad copy from Chiat/Day signals the switch: "Just because you have a family, career and responsibilities doesn't mean you can't have a sports car." But, clearly, Nissan isn't aiming for the low-rider or mag-wheel crowd. Says another new ad: "This car was meant to be driven by professionals — bankers, lawyers and doctors."

The new Maxima line — all four-door sedans — consists of three cars, the more stately GXE and two versions of the zippier SE. Their suggested base prices range from $17,000 to $18,899. The target market for the GXE is 25-to-34 years old, while the SE's is in the 35-to-49 year-old range. But in both cases, about 60% of purchasers are men and the median incomes are at least $50,000.

According to Leading National Advertisers, the brand received about $7.1 million in support through the first six months of 1988. Foutz says the almost 2:1 ratio of television advertising to print will be the same for the new positioning as it was for the '88 model. Television buys for the '89 Maxima include the World Series, NFL football and various bowl games, *L.A. Law*, *Moonlighting*, *thirtysomething* and *Cheers*. Print buys will be much the same as last year, with *Time*, *Fortune*, *Motor Trend*, *Sunset*, *Southern Living*, *Playbill*, *USA Today* and the *Wall Street Journal* among the titles on a lengthy list. The Maxima will also receive some radio spending but no outdoor.

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Volvo 240 DL and GL

Sales of the Volvo 240 line rank it second in this category, with 26,361 units through September. Not bad for a car that Volvo's manager of marketing services, Milt Gravatt, says "is basically the same car we've been selling since the 1960s." It's a car widely referred to as the "box on a box," because of it's square-ish body on a square chassis.

The 240 sedans and wagons have been restyled somewhat since the 1960s, but not much. The '89 models are carbon copies of what rolled off the line in 1988. The DL and GL lines are both available in sedan and wagon models, the difference largely being standard equipment. List prices range from $17,820 for the DL sedan to $20,775 for the GL wagon.

As the least expensive cars in Volvo's line, the marketing for the 240s, says Gravatt, "is used to highlight their entry-level pricing, safety and value." He says the line received about $8 million in ad support in 1988, not including dealer spending, and that there will be no change in the level of spending or the marketing slant in 1989. But the 240 more than carries its weight: It receives about 25% of Volvo's ad dollars, but accounts for nearly 40% of all units sold.

Volvo's target is "anyone who's bought a hard-cover book."

Gravatt says that 40% of the media buys for the 240 line are in local newspapers, advertising that's done in conjunction with dealers. Much of that print advertising is used to emphasize Volvo's highly-rated resale value. Sixty percent of the budget goes to television, much of it buying spot time in local news shows. Sports shows are a Volvo favorite, too, with emphasis on country-club sports such as tennis and golf. The 240 is also advertised during television documentaries and upscale movies (*Gandhi*, for example). Like almost all of the cars in this near-luxury category, Volvo doesn't offer any sales promotions other than incentives to its dealers.

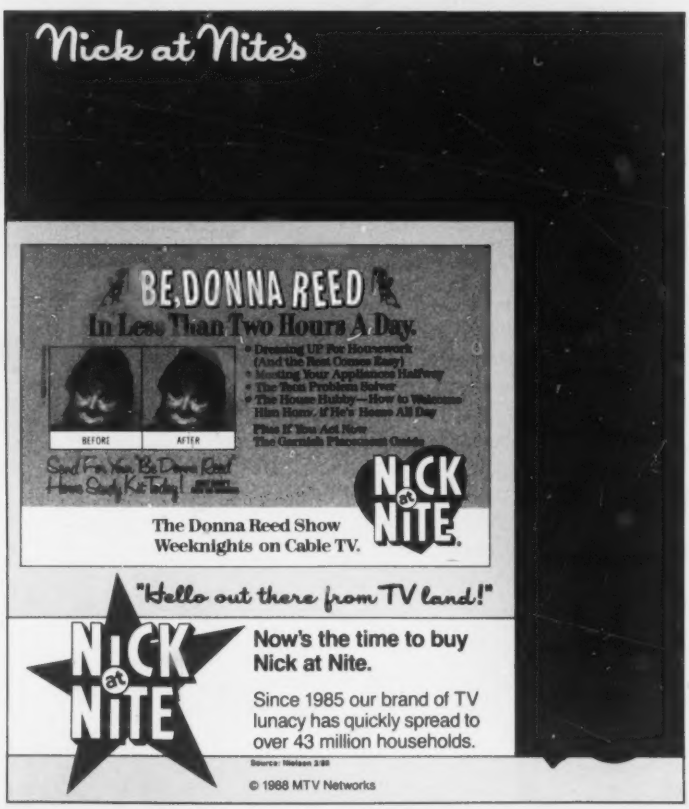
The psychographic profile of a 240 buyer, says Gravatt, is "academic, pragmatic and thoughtful. We have an inside joke that the guiding psychographic for a Volvo buyer is someone who bought a hardbound book in the last three months." The median age for a 240 driver is 37 years, 65% are married, 81% graduated from college and the median household income is $60,000. Seventy-five percent of 240 station-wagon drivers are women.

BMW 3-Series

It is perhaps with some justification that Carl Flesher Jr., vice-president of marketing at BMW of North America, disagrees that any BMW could fall into this J.D. Power category. "A BMW owner would never think, if he or she had spent $25,000, that it was for a near-luxury car," he sniffs.

That may be true. But despite their ample price points, most models in the 3-series are pitched to consumers as "starter" BMWs. Though the top-of-the-line BMW sedan (the 750iL) lists at $70,000, this line is, as Flesher puts, "for people who can't afford everything." The 3-series, which encompasses seven different models, including a convertible, ranges from a list price of $24,650 to $34,950, making it the most expensive of the near-luxury cars.

The 3-series consumer, he says, buys the car for emotional and rational reasons. Emotionally, "It's about social hierarchy" or image, and television is used to pitch the "ultimate driving machine's" status appeal. Print is used to give buyers a rationale for their BMW urge. The 3-series specs are outlined in print ads that appear in the major newsweeklies, business books,


Nick at Nite's
BE DONNA REED
In Less Than Two Hours A Day.
BEFORE
AFTER
The Donna Reed Show
Weeknights on Cable TV.
NICK at NITE
"Hello out there from TV land!"
NICK at NITE
Now's the time to buy Nick at Nite.
Since 1985 our brand of TV lunacy has quickly spread to over 43 million households.
© 1988 MTV Networks

Sports Illustrated and a wide range of upscale publications, including *Art & Antiques, European Travel & Life, HG* and *Vanity Fair*. The brand is also advertised on radio in urban areas, with ads timed to air during heavy drive-time traffic.

Flesher says the 3-series gets about 25% of the company's annual ad budget and will see a 5%-to-10% rise in its dollars in 1989. One reason is that, despite the fact that it's approaching the end of its product cycle, the series got a minor facelift in '89, and the company dropped its most powerful engine into the car.

But, more important, the company is spending greater sums to protect this car's position. The 3-series is responsible for 50% of BMW's American sales. For the first seven months of 1988, according to J.D. Power, sales totaled 21,872. The company is looking for an '88 total in the 40,000 range. "This is a solid bread-and-butter car," says Flesher, chuckling at the irony of his statement about a car this pricey. "Those conquest sales are extremely important to us," he adds, alluding to

BMW's 3-series will get a 5%-to-10% boost in ad dollars in 1989.

all those first-time BMW buyers the "3s" have reeled in. LNA reports multi-media spending on the line as over $7 million for the first half of 1988.

The 3-series convertible goes after a different demographic than the rest of the line. The top-down model lists at $33,850 and reaches for people in their early 40s with a household income of over $100,000. The other models target a group with a median age of 35 and incomes of at least $70,000. 35% of those buyers are women. BMW offers its dealers a handy rule of thumb: A customer's household income should be at least three times the retail price of the car.

Saab 900

Analysts and other car makers often used the word "weird" or "eccentric" to describe the look of the Saab 900 series.

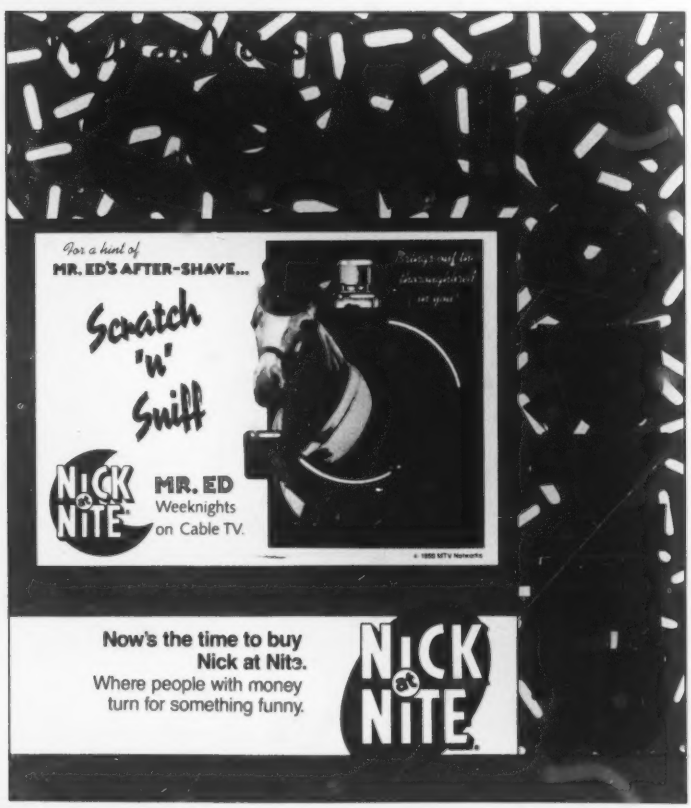
But with U.S. sales as respectable as Saab's, it's a "sticks and stones may break my bones..." situation. J.D. Power shows nine-month sales of the 900 line at 18,323, and the company projects it may top out in the 30,000-

Despite a change in agencies, the Saab's sell will remain unchanged.

car range by year's end. That's roughly the same number it sold in 1987 and about what it's expected to do in '89.

Though the 900 line has been around for some time, its oddball sleekness and reputation for safety has caught on, particularly with upscale families, in the past few years. The basic 900 market has a median age of 35, is 55% male and has a median income of $55,0000. Compare that with the 900 convertible's market of 76% male buyers, median age 43 and median income of a whopping $130,000.

Gradually, however, the 900's market share is being encroached upon by



the Saab 9000, a much more luxurious and powerful line. The 900 model range in price from $17,000 to $32,095 for the zippy convertible, while the starting price for the 9000 line is about $24,000.

The company sees two reasons for the drift. Some 900 owners are moving up to the 9000. But there also has been a rise in "conquest sales," with consumers switching from other high-priced makes over to Saab.

Though Saab changed ad agencies recently, hiring Lord Einstein O'Neill & Partners, not much about the '89 campaign will change from the year before because nothing much changed about the 900 itself. The entire Saab line, all 900 and 9000 models, received over $25 million in ad support this year, according to a company spokesman. Media spending should remain the same through 1989, he says. LNA shows nine-month '88 print spending at over $2 million in books including *Golf Digest, Inc., New Yorker, Smithsonian, Texas Monthly* and the *New York Times Magazine*.

The 900's sales are the best in the Northeast, followed by the Central, South and West regions of the U.S. The company feels the Sunbelt is its potential growth market. Given its map of sales hotspots, Saab puts no national television advertising behind the 900, but does hit the spot markets heavily. Some buys are made in radio, as well.

Mazda 929

The Mazda 929, new to Japan in 1986, was rolled out in America in the fall of 1987. It took dealers a while to get a feel for the the car, and for much of 1988, the company will admit, sales lagged behind projections. J.D. Power shows a nine-month total of 18,217 sold. Despite the fact that sales seem to have moved into a healthier 2,000-unit-per-month gear, Mazda is taking no chances. The 929 is in the process of being re-launched.

"We're taking it upmarket, giving it more personality and really defining it," asserts Jan Thompson, vice president of advertising. Mazda now defines the 929's segment as "functional luxury." States Thompson, "This is a change in image." The company is projecting a 1989 sales total of 30,000 units.

Mazda's much bigger 929 ad budget in 1989 will make it number two in ad support among the company's five lines.

Though Mazda won't disclose advertising investment figures, Thompson says the company will be spending "a lot more" on the 929, giving it second-place media weight in its line of five different cars. Much of the budget will go to network television. Creative for the tv campaign will change for '89. Spokesman James Garner will no longer be on-camera for his 30-second spot; he'll just be a voice-over. Mazda wants all eyes on the 929 itself and thinks his star-power may overshadow the car.

Tv buys for '89 will include *L.A. Law*, NBC's *Sunday Night Movie*, *The Equalizer*, *Midnight Caller* and "tons of football." The car will also pop-up on the putting green: Mazda sponsors a number of televised golf tournaments. Print buys include *Time* and *Newsweek*, *Forbes*, *Fortune* and *USA Today*, with buys in additional "upscale" books planned.

The 929 has a sticker price of $21,920 and, like many cars in the near-luxury category, has few options — even a moon-roof is standard. The car's market proves to be as follows: 70% male; 83% married; 61% are college graduates; median age is 45; median income is $64,000; 50% are young and middle-aged parents. According to Bill Hackett, vice president of marketing at Mazda, a big source of 929 customers are people who've already owned a comparably-priced car but are looking at other brands. "They're coming across, rather than moving up," he says, "and luxury buyers don't move down too often."

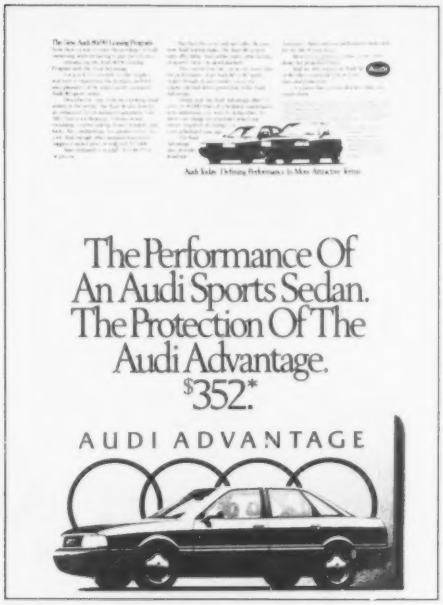
Audi 80 and 90

The unintentional-acceleration scare that plagued the Audi 5000 model (sold here since 1978) has caused Audi of America's overall sales to slip in a big way. It also left the company's marketing department with a Tylenol-scale mop-up job. By 1987, U.S. sales had fallen to 41,322 cars from a 1985 peak of 74,061.

In the fall of 1987, the company began what marketing manager Jay Houghton says is a "three-to-four year reconstruction plan for our image." For starters, it renamed its U.S. lines. The 4000 series became the Audi 80 and 90, and the 5000s are now the 100 and 200.

The brand's near-luxury models, the 80 and 90, are virtually the same car except for standard equipment and engine power, and they range in price from $18,600 to $24,330. Houghton says the 4000s had been already known for a few years in Europe as the 80 and 90, and the company had plans to internationalize the name.

"It's a very difficult thing to go back into people's minds and counter that *60 Minutes* program," admits Houghton, referring to a well-known episode that investigated the 5000's problems. "It's going to take us years to outlive that — it was devastating." Indeed, J.D. Power shows sales for the 80 and 90 through September at a mere 8,518,



Audi's marketing plan promotes "enhanced ownership."

with Audi estimating the figure totaling around 15,000 for the year.

There are three facets to the recovery plan, the first being what Houghton refers to as an enhanced "owning experience." This is basically a three-year, 50,000-mile warranty package that he says includes "maintenance on everything except the tires." It also includes a AAA-type roadside assistance plan (some other companies are actually hooked into the American Automobile Assoc.) and a "guaranteed resale index." The latter promises that the Audi will carry the same resale value as its direct competitors — as long as you plan to do your reselling at an Audi dealership. "It's self-serving, for sure," Houghton admits. "We're hooking it into buying another Audi."

Advertising is another pillar of the plan. Ads to acquaint the public with the 80 and 90 names began in September of 1987 and continued through the following spring. Last August, the primarily-print "Audi Today" campaign began "to tell people about the future of Audi," explains Houghton. It ran in the *Wall Street Journal* and *USA Today* twice-a-week for about two months and appeared in business magazines and some lifestyle and car-buff books. "We're trying to make a break with the past," he says. "That's why we got into print — it's too complicated a message for 30 seconds."

Regional marketing is the third part of the salvage operation. Beginning in January, prime Audi markets will be hit heavily with print ads. Television spots will be available for dealers to use, but there'll be no national coverage for the lines — too expensive for now, Houghton says. Audi's total ad budget for 1988 will be about $50 million. LNA shows the company spending nearly $14 million on the 80 and 90 through June. Houghton adds that network tv is "entirely plausible" in the future.

Toyota Cressida

The Toyota Cressida is the car most often cited by other manufacturers in the near-luxury category, as well as industry observers, as the line least qualified to be in this segment. It's possible, though, that they are focusing on Toyota's brand image — an image the company's national advertising manager David Danzer describes as "reliability and durability" — instead of the Cressida itself.

The company's "flagship car," the restyled-for-'89 Cressida, has a $21,500 sticker price and a near-luxury package of standard features. The brand, explains Danzer, was at the end of its product cycle and due for some changes like a bigger engine and better suspension. But its purchaser demographics changed between 1987 and '88, too.

Previously the car's market was a bit older, less male and not quite as well off. Demos were: 53% male; 80% married; 48% college grads; 49 years median age; median income of $55,000. By 1988, that had shifted to: 60% male; 75% married; 55% college grads; median age of 46; $65,000 median income. The company reports sales figures of 12,892 for calendar year '87, which made it account for 4% of Toyota's U.S. sales that year. J.D. Power shows sales of 7,878 through September of this year.

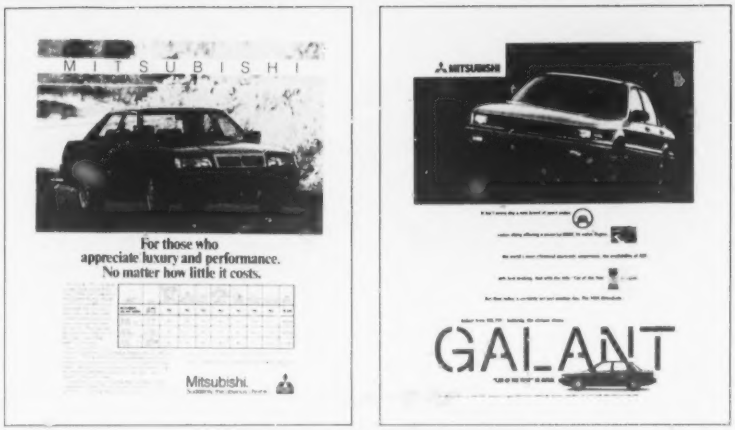
Toyota is advertising the Cressida on television for the first time since the '86 model year. Last year the line was pitched in print and supplemented with a tiny bit of radio. The '89 model Cressida got its first taste of tv in the World Series with the "Pride of Toyota" ads. Though it received heaviest support in the last quarter of '88, it will be advertised through the next year. Media dollars are also going to upscale cable buys (Arts & Entertainment, CNN and

golf and tennis tournaments on ESPN) and local news, fringe and late night television.

The car was launched in print with four-page inserts in eight magazines, including *Time*, *Architectural Digest*, *Forbes* and *Scientific American*. Other books like *Fortune*, *Atlantic Monthly*, *Life* and *Lear's* received spreads and single pages. And since over 50% of its sales are centered in only ten markets, regional print buys such as *Los Angeles Magazine*, *Sunset* and the *New York Times Magazine* figure prominently into the plan.

Cressida was also the subject of an unusual mailing in November — a video brochure to 150,000 Toyota owners. The company is gambling that the upscale household targeted will have a VCR. A second mailing will occur in Febuary to target non-Toyota owners.

Leading National Advertisers shows nine-month print expenditures totaling $1.2 million.



The many incarnations of Mitsubishi's near-luxury entries seem to have done more to confuse the public than to convert them.

Mitsubishi Galant Sigma

There's not a lot of enthusiasm at Mitsubishi for this car. This is evidenced by its recent name change, the lackluster marketing plans for it and the tone of resignation people at the company use to talk about the car. "Our sales goals aren't that ambitious for it," concedes Mike Nash, Mitsubishi's vice president of marketing services. "We haven't done that much with the car in '88 and won't do that much in '89," he says.

That may be the kindest thing, because the Galant (sic) Sigma has had a roller-coaster recent past. The car was redesigned — made a bit longer and given a new engine and suspension system, for instance — for the 1987 model year.

Fine. Then, the company introduced its Mitsubishi Galant, a sporty sedan, last spring. At that same time, the company shrunk the name of that redesigned Galant Sigma to, simply, Sigma. The company says that it kept half of the name because it wanted to hang onto that car's prestige and franchise. The result is an understandably confused marketplace.

Nash says there's another reason for holding back on ad support for the Sigma. "Let's face it, there's a lot of competition out there, and we're just not that big a company that we can go out and fight those battles," he sighs. J.D. Power says the car's nine-month sales were 5,554; Sigma's sticker price is $17,069. Nash says Mitsubishi plans to ship only 4,600 Sigmas to America in '89.

Mitsubishi says the redesigned Sigma received $2.6 million in tv advertising from fall '87 through the fall of 1988, and about $3 million in print during that same time period. Mitsubishi also revealed that television support is expected to be cut from the '89 media plan, with advertising for the Sigma mostly done in print placed in upscale magazines.

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In times of emergency, are you Help?
If not, learn Red Cross First Aid where you work -
or call your local chapter.

American Red Cross

"It's true Doc. Alien creatures are everywhere, I'm Napoleon Bonaparte and you can cover Southern California's richest market with an L.A. paper."

*The Register Metrogroup reaches 41% of all Orange County households, in contrast to only 22% for the largest L.A. paper.
Source: ABC Publisher's Statements, 3/31/88

THE ORANGE COUNTY Register METROGROUP

The leading medium in Southern California's richest market. Represented by CWO&O

Peugeot 505

The Peugeot 505 line was introduced to the U.S. in 1980 and is scheduled to be replaced by a larger car in the near future, according to Jean-Phillipe Fournier, national marketing manager. Therefore, he says, "It's not very important." J.D. Power shows nine-month sales of 4,589 for the 505. Peugeot projects that sales could drop to 3,000 in 1989.

For the moment, the 505 comes in a variety of sedan models (the lowest-priced at $19,295) and station wagons ($17,590).

Peugeot did advertise the 505 line some in 1988, emphasizing newspapers, magazines and cable tv. Nine-month print figures from Leading National Advertisers show Peugeot

Peugeot's 505 is not long for this world.

spending nearly $5 million on the line and buying in *Business Week*, *Ebony*, *Elle*, the *New Yorker* and *Southern Living*, among other books.

The company just launched its new 405 sedan, a sleek, upscale car aimed at the younger crowd. The company is hoping they will join its traditional market of people in their late 40's and 50's.

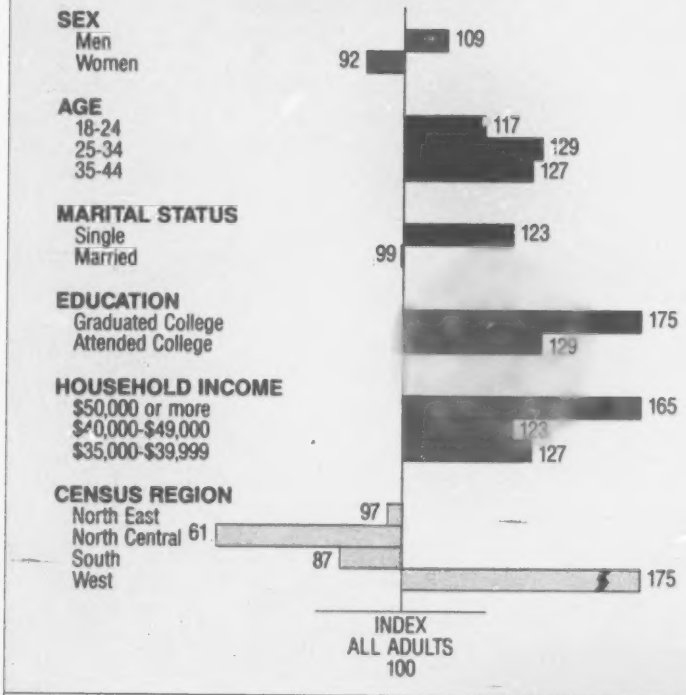
Peugeot has had its troubles in the U.S. car market over the years. Its diesel engines didn't take off, and it had distribution and servicing problems, too. Fournier readily admits, "We don't have any intention of becoming the dominant car maker in the U.S. We'll always be somewhat specialized in this market." ■

BRAND REPORT INDEX

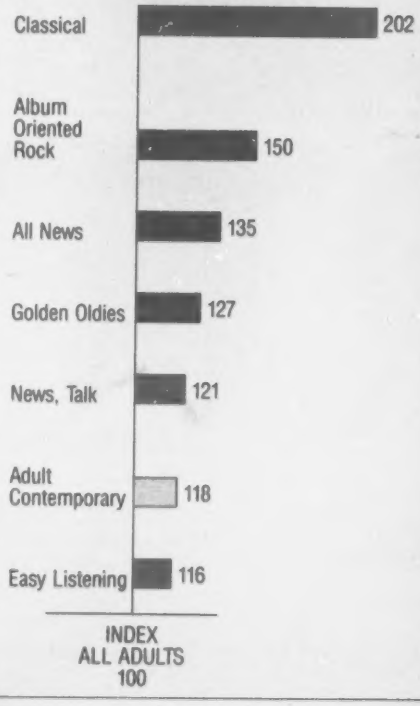
NEAR-LUXURY CARS

How to read: Closest breakout is import-owner segment. Our indices of user demographics and media preferences are used to indicate the direction and amount of difference from the average. The index of the average is, by definition, 100. Thus, an index of 112 reflects a 12% above-average incidence. An index of 89 indicates an 11% below-average incidence.

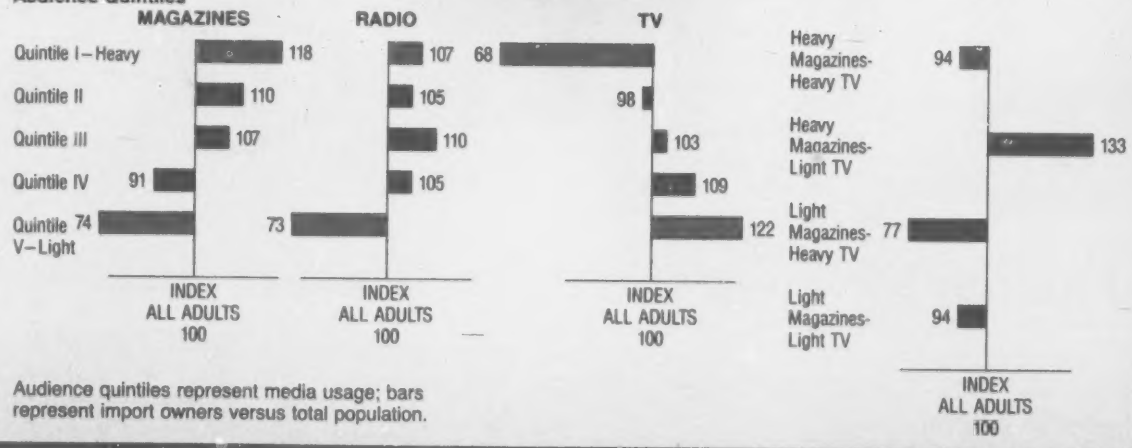
KEY DEMOGRAPHICS: IMPORT OWNERS



RADIO FORMATS FAVORITES: IMPORT OWNERS



MULTI-MEDIA EXPOSURE: IMPORT OWNERS



Audience quintiles represent media usage; bars represent import owners versus total population.

WHERE LIES THE BETTER BUY?

AGENCIES HAVE THE DEPTH

To place or not to place." A trite phrase that, for some unknown reason, seems to often occupy an advertiser's mind when it comes to developing and managing an advertising program.

While it is a popular opinion that efficiencies are often gained when an advertiser controls his own media planning and placement, is it really true? And are "efficiencies" the only important issue in making this decision?

Many advertisers take exception to the idea that media planning and placement "in-house" is a wise decision. Dell Computer Corporation currently utilizes its advertising agency for media planning and placement, but this decision was made with careful consideration. Dell recognizes the important role strategic media planning plays in the success of the total advertising program. It also recognizes that the responsibility for success rests equally with the advertising agency and Dell.

For this option to work to an advertiser's advantage, an agency must meet certain criteria. The agency must provide an environment that attracts talented, dedicated creative media professionals who consider media a career. The client, on the other hand, must provide an environment that encourages the media team's participation in the total marketing process.

Assuming that the agency provides the strong media leadership necessary, there are many reasons why the agency providing media planning and placement can be an advantage:

- A top-notch media department can be a crucial contributor to the overall marketing process. Through their ability to work hand-in-hand with the account and creative team in the development of brand positioning and strategy, new and innovative thinking is often brought to the total program.
- It has been proven many times that the most "creative" ideas often originate within the media department. A level of synergy is achieved when the media, marketing and creative teams work together on a daily basis.

- The client is able to take advantage of the cross-learning that exists within a strong media department. A media department that is forward-thinking keeps their staff trained as the industry changes.
- It is also believed that the agency has the advantage of a more objective viewpoint than is often exhibited within a client's corporate structure. This happens only if the media understands the client's business and has an approved set of objectives and strategies against which media can be evaluated.
- The client can take advantage of an agency's clout in the marketplace as a result of their combined list of clients. An often "overplayed" advantage by agencies in term of rate negotiation, valid examples do exist and include other opportunities such as participation in client-shared market research.
- The client has the benefit of an entire media team. To duplicate a high-caliber media team and provide the necessary resources is often considered cost prohibitive to advertisers. Few are willing to recognize the need for it or are willing to make the necessary investment.

Of course, responsibility for success is shared by the agency and the advertiser. The agency must make a commitment to hire top-quality media professionals who have a passion for the business. A media department is only as good as the commitment it receives from upper agency management.

The client, on the other hand, cannot abdicate responsibility to its agency. A partnership must exist and the client is responsible for providing an environment which encourages maximum contribution from its agency media department. The client should not only have a participatory role in the development of media objectives and strategies, but also encourage creativity and innovative thinking by being open-minded to the media recommendations.

The utilization of this philosophy does not mean that the advertiser loses control. The advertiser should demand and expect excellence and accountability in the development of a media program, select an agency which has made a commitment and can meet the challenge, and provide the environment necessary to encourage creative participation from the media department in the entire marketing process.

Mary Jane Lawhon is the advertising manager for the Dell Computer Corporation of Austin, Texas.

POLL

THE BEST OF BOTH WORLDS

On the one side you have advertisers who swear by their agency's ability to buy their media. On the other, you have advertisers who do it mostly themselves. Both approaches have been documented as successful, both perfectly traditional.

Is there room in our media world for a non-traditional middle-ground approach? At Coors, as well as at several other consumer-goods companies, we believe there is. It's referred to in many ways, but at its core is an attitude that both agencies and advertisers can work together cooperatively, rather than separately, to achieve intelligent, cost-effective media placements.

Here's how it works. A group of corporate-funded field marketing people, each with a very specific geographic territory, holds responsibility for planning and directing the placement of advertising dollars mini-market by mini-market. That's because we divide the country into 600-plus pieces (virtually one for each of our wholesalers). This is accomplished by working individually with our wholesalers, each of whom's mini-market is different, based on business development, seasonality, demographic consumer profile, marketing budget, consumer media consumption habits, state laws and promotional opportunities.

Together with our agency buyers, we first find ways to assimilate corporate strategies with local market conditions. Once set, the buying group and our field personnel move promptly to negotiate schedules, rates and merchandising arrangements with stations.

All in all, it looks like we go to a lot of extra work, involving a lot of extra people (read: overhead cost). So why bother? In a word, results.

Having client-supplied experts in the field traveling to markets regularly and working solely on our business is a whole step beyond traditional agency regional buying set-ups. Our people are able to pick up media and consumer trends and react to them fast. They are ideally positioned to integrate special creative or pursue unique local event sponsorships into our marketing efforts. Armed with a specific direction, our agency buyers exercise their keen sense of media value and media discipline by negotiating the basic schedules. Having been brought into the decision-making loop early, the agency obtains superior station effort, including close attention to our paid schedules and enthusiastic pursuit of our merchandising needs. Moreover, the agency handles all the critical paper flow, an area too often overlooked and underrated in its importance.

Remembering that the concept is to have people do what they do best, we think we have the best of both worlds in our media-placement efforts.

Mark A. Reiss is the director of media and field marketing at Adolph Coors Company.

ECONOMIC EYE

COUPONS CLIMB

According to the Manufacturers Coupon Control Center, a whopping 215.2 billion coupons were distributed by manufacturers last year. While those carried within product packaging had the highest redemption rate (14%), free-standing newspaper inserts tallied a respectable 3.6% redemption rate.

MAGAZINE AD SCORECARD

	Ad Pages Nov. 1988	% change from Nov. 1987	Dollars spent (000)	% change from Nov. 1987
1. Skin Care, Creams, Lotions and Oils	202.32	−1.9%	$ 7,545.9	+9.0%
2. Lip and Eye Beauty Products	139.71	+10.3	4,564.5	−4.4
3. Scents and Fragrances	314.69	+50.4	9,155.0	+54.8
4. Facial Makeup Products	150.45	+16.6	5,896.0	+30.2
5. Prepared Dinners and Entrees (including Pizza)	26.06	−13.3	1,424.0	−39.1
6. Liquor	423.27	−3.2	17,958.6	−3.7
7. Cigarettes	649.96	+7.7	37,674.3	+20.8
8. Soaps and Detergents	27.17	−53.3	1,528.5	−55.9
9. Passenger Cars, Domestic	416.02	+29.8	25,344.8	+18.5
10. Passenger Cars, Imported	570.71	+65.5	32,200.4	+75.5

Source: Publishers Information Bureau as prepared by Leading National Advertisers

MEDIA COST INDEX

1985 = 100 — 1988

	Jan.	% change	Feb.	% change	March	% change	April	% change	May	% change	June	% change	July	% change	Aug.	% change
Network TV																
Daytime	92	0	80	−7	82	−7	78	−15	76	−18	73	−22	81	−17	73	−14
Nighttime	112	+5	148	+41	113	+13	99	0	110	−0	122	+8	110	+0.3	118	+4
Spot TV																
Prime time	128	−1	130	−2	115	−12	125	−9	126	−8	125	−4	–	–	125	−8
Daytime	123	−5	108	±0	98	−9	95	−18	103	−13	93	−10	–	–	100	−14
Network radio	147	+6	129	−7	121	−4	116	+0	116	+2	116	+2	102	−0.5	111	+6
Spot radio			106	+3			–	–	101	+3	–	–	–	–	–	–
Consumer magazines	114	+5	115	+5	115	+4	115	+5	115	+5	115	+5	115	+5	114	+5
Natl. Sunday mags	117	+13	116	+13	116	+13	116	+13	116	+13	116	+13	116	+13	128	+14
Business publications	117	+5	117	+5	117	+5	117	+5	117	+5	117	+5	117	+5	117	+5
Newspapers	124	+7	124	+7	124*	+7	124	+7	124	+7	124	+7	124	+7	124	+7
Outdoor	123	+11	123	+11	123	+11	123	+8	123	+8	123	+8	123	+8	123	+8

Notes: Percentage shown is relative change from the same month/period the year before.
*Revised

Sources:
Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.
Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.
Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.
Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.
National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.
Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.
Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.
Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.
Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.